

## Chapter 26 – Mass Update

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**Important**      The required fields referenced in this chapter refer to system-required fields. These fields are required in order for the form to be saved in approved status.

                         The information that is required due to policy may be different from those that are system required.

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# Plan of Care Mass Update - Overview

## Introduction

The Mass Update process automatically makes changes to Plans of Care for a variety of provider, program, and pricing changes for non-Medicaid services.

The Mass Update process terminates a plan of care service line item, entering the appropriate end date based on the information provided in the Mass Update. It then creates a new service line item, entering the appropriate entries to reflect the change made. The new service line item has the same end date as the original line item had prior to the mass update.

## Original Plan of Care:

#	Organization	EDS line #	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Approval Status	Err	Approval Date	Unit Cost	Oblig.	MO Cost	Processed	ESD Srv Line Ind	ESD KDADS App Ind	ESD KDADS App Dt
1	4	-	ASMT	N	SCA	0	JAYHAWK AREA AGENCY ON AGING	12	YR	12	06/15/15	06/16/15	14				13.76	0	165.12	EXISTING			
2	4	-	CMGTS	N	SCA	0	JAYHAWK AREA AGENCY ON AGING	9	QTR	3	06/15/15	06/14/16					13.76	0	41.28	EXISTING			
3	4	-	HMKR	Y	SCA	0	ADVANTAGED HOME CARE INC	6	WK	30	06/15/15	06/14/16					15	0	450	EXISTING			

row(s) 1 - 3 of 3

Save All POC info Monthly Cost Add Line

## Plan of Care after 'Old Rate to New Rate' Mass Update:

#	Organization	EDS line #	Service	Self Direct	Funding	SCA %	Provider	Units	Freq	Total MO Units	Start Date	End Date	Dischrg Code	Approval Status	Err	Approval Date	Unit Cost	Oblig.	MO Cost	Processed	ESD Srv Line Ind	ESD KDADS App Ind	ESD KDADS App Dt
1	4	-	ASMT	N	SCA	0	JAYHAWK AREA AGENCY ON AGING	12	YR	12	06/15/15	06/16/15	14				13.76	0	165.12	EXISTING			
2	4	-	CMGTS	N	SCA	0	JAYHAWK AREA AGENCY ON AGING	9	QTR	3	06/15/15	06/14/16					13.76	0	41.28	EXISTING			
3	4	-	HMKR	Y	SCA	0	ADVANTAGED HOME CARE INC	6	WK	30	06/15/15	06/30/15	29				15	0	450	EXISTING			
4	4	-	HMKR	Y	SCA	0	ADVANTAGED HOME CARE INC	6	WK	30	07/01/15	06/14/16					16.75	0	502.5	EXISTING			

row(s) 1 - 4 of 4

Save All POC info Monthly Cost Add Line

## HCBS Waiver Services

With the launch of KanCare on January 1, 2013, HCBS services are no longer entered on KAMIS plans of care. Only assessments for waiver services (FAI, BASIS, etc.) appear on waiver customers' plans of care, and Mass Updates are not performed on the assessment service lines.

## Important – Mass Update Timing

***The Mass Update must be processed during the month the change being made takes effect.***

The most common Mass Updates done are for rate changes for Federal and State funding programs. State rate changes usually go into effect on July 1, and Federal rate changes usually go into effect on October 1.

***Example:*** Rate change for CMGTS/SCA service/funding combination is effective July 1, 2015. The Mass Update must be processed before midnight on July 31, 2015.

If a Mass Update is not processed by the deadline, the organization runs the risk of losing money if the Mass Update was for a rate increase. If KDADS has to force the rate change past the original deadline, the new rate may not take effect until at least one month later than the actual rate change date.

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## Plan of Care Mass Update – Overview, continued

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### Important – Plan of Care Status

***Make sure no one has a plan of care (POC) open that will be affected by the Mass Update.  
The Mass Update process cannot make changes to a locked POC.***

It is recommended that Mass Updates be run at a time of day when users will not be accessing plans of care, or that arrangements be made within the organization to stay out of plans of care during a pre-arranged time for the Mass Update to run.

If a user has a plan of care open, or did not use the 'Unlock & Close' link to exit out of a plan of care, the POC may be 'Locked' and should show this status on the customer's Forms list.

When the Mass Update runs, and the POC cannot be updated because it is locked, it will count as an error. The completion message will report 'x' number of records processed, with 'x' number of errors. The locked POC would be one of the errors.

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### Mass Updates Options

There are several different options for processing a Mass Update to change all affected Plan of Care service line Items:

- From Old Rate to a New Rate
    - ▶ changes the unit cost of the service line items
  - From Old Rate to a New Rate for Nutrition Providers
    - ▶ use for unit cost changes of Nutrition Meal Sites that have a Parent Organization
  - From Old Provider to a New Provider
    - ▶ use to replace one provider with another provider for a specific service/funding combo
  - Old service/funding combination to new service/funding combination within the same Provider
    - ▶ use when the Funding changes, but not the Provider
  - For a Terminated Provider
    - ▶ use when a provider is no longer providing a service and there is no replacement provider
-

# Accessing Mass Update

## Prerequisites

All changes affecting a Mass Update must be entered into the appropriate KAMIS Administration Maintenance functions **before** any changes can be processed.

For example, new prices must be entered in Provider Service. A new Provider must be added in Organizations.

**Important Note:** It is not required, nor recommended, that old prices or providers be terminated prior to a Mass Update. The termination dates should not be entered until all plans of care are closed out and services have been billed for the old prices and/or providers.

## How To

Follow the steps in the table below to access Mass Update.

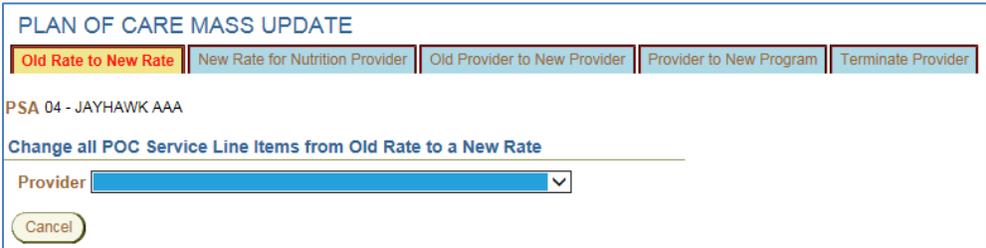
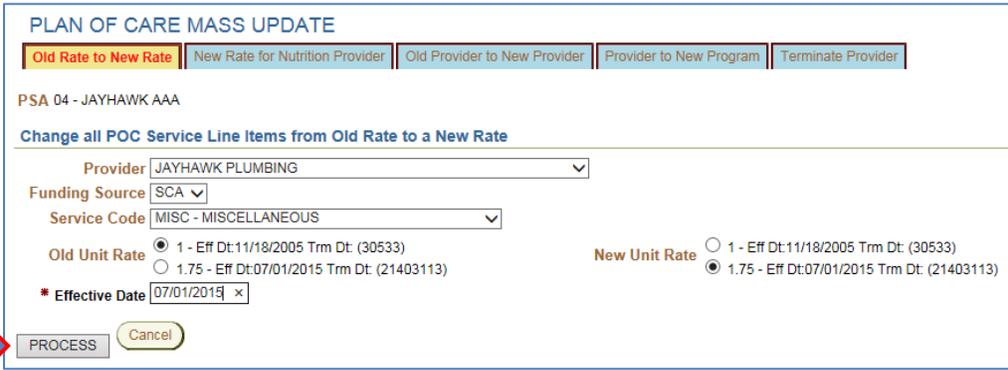
Step	Action	Result
1.	Click on the <b>Mass Update</b> button on the KAMIS Home Page, under the ADMINISTRATION region.	The Plan of Care Mass Update page displays.
 <p>The screenshot shows the KAMIS Home Page Administration region. It is divided into three main sections: PERSON SEARCH, ADMINISTRATION, and WORKLOADS. The ADMINISTRATION section contains buttons for Budget, Provider Service, Service Funding, and Mass Update. The Mass Update button is highlighted with a red box. Below the ADMINISTRATION section is the BILLING section with a Care Billing button. The WORKLOADS section contains buttons for ADRC Options Counsel, Referrals for ADRC Opt, Medicaid Eligibility Wor, POC Service Reduction, and SED Service Authorizat. At the bottom right, there is a REPORTS section. Below the ADMINISTRATION section is the PLAN OF CARE MASS UPDATE section, which has a title bar with five tabs: Old Rate to New Rate 671, New Rate for Nutrition Provider 672, Old Provider to New Provider 673, Provider to New Program 674, and Terminate Provider 675. The first tab, Old Rate to New Rate 671, is selected and highlighted in yellow. Below the tabs, the text 'PSA 04 - JAYHAWK AAA' is displayed. Underneath, there is a blue link 'Change all POC Service Line Items from Old Rate to a New Rate'. Below this link is a dropdown menu labeled 'Provider' with '&amp;nbsp;' next to it, and a 'Cancel' button.</p>		
2.	Select the navigation tab that corresponds to the change to be made.	The navigation tab turns yellow and the page changes to reflect the selected function to be performed.

The following sections provide instructions for each Mass Update navigation tab.

# Old Rate to a New Rate

## How to

Follow the steps in the table below to process a change in a Provider's service unit cost.  
 Note: All fields in this Mass Update process are required.

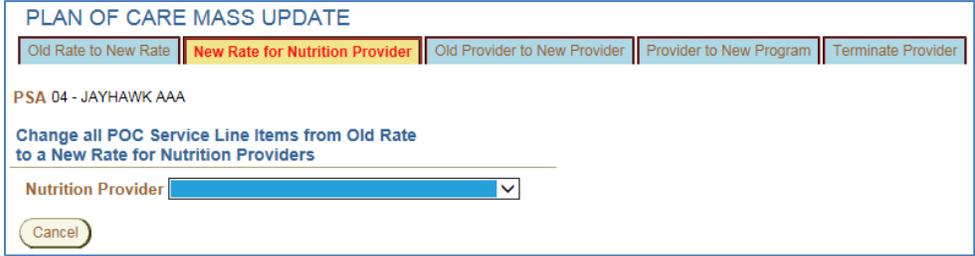
Step	Action	Result
1.	Select the navigational tab <b>Old Rate to New Rate</b>	The navigational tab is yellow and the Provider selection field displays.
		
2.	Select the <b>Provider</b> from the drop-down list.	The Funding Source field displays.
3.	Select the <b>Funding Source</b> from the drop-down list.	The Service Code field displays.
4.	Select the <b>Service Code</b> from the drop-down list.	The Old Unit Rate and New Unit Rate choices display, populating from Provider Service pricing entries.
5.	Click the radio button of the <b>Old Unit Rate</b> that the mass update will terminate.	
6.	Click the radio button of the <b>New Unit Rate</b> that the mass update will use in the new service lines.	The Effective Date field displays.
7.	Enter the <b>Effective Date</b> of the rate change.	This will be the Start Date of the new service lines created by the mass update.
		
8.	Click on the <b>Process</b> button.	A confirmation message appears: 'Are you sure you want to process?'
9.	Click on the <b>OK</b> button to confirm the Mass Update should run.	When the mass update is done, a message displays stating the number of records processed and if there were any errors.

# Old Rate to New Rate for Nutrition Providers

**How to**

Follow the steps in the table below to process a change in Provider service unit cost for Nutrition Providers who are Parent Organizations of meal sites.

Note: All fields in this Mass Update process are required.

Step	Action	Result
1.	Select the navigational tab <b>New Rate for Nutrition Provider</b>	The navigational tab is yellow and the appropriate fields display.
		
2.	Select the <b>Nutrition Provider</b> from the drop-down list.	The Funding Source field displays.
3.	Select the <b>Funding Source</b> from the drop-down list.	The Service Code field displays.
4.	Select the <b>Service Code</b> from the drop-down list.	The Old Unit Rate and New Unit Rate choices display.
5.	Click the radio button of the <b>Old Unit Rate</b> that the mass update will terminate.	The Old Unit Rate and New Unit Rate choices display, populating from Provider Service pricing entries.
6.	Click the radio button of the <b>New Unit Rate</b> for which the mass update will add new service lines.	The Effective Date field displays.
7.	Enter the <b>Effective Date</b> of the rate change.	This will be the Start Date of the new service lines created in affected plans of care.

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# Old Rate to New Rate for Nutrition Providers, continued

How to (continued)

Step	Action	Result
	<div data-bbox="367 369 1446 1016" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center; margin: 0;"><b>PLAN OF CARE MASS UPDATE</b></p> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 5px;"> <span style="border: 1px solid black; padding: 2px;">Old Rate to New Rate</span> <span style="border: 1px solid black; padding: 2px; color: red;">New Rate for Nutrition Provider</span> <span style="border: 1px solid black; padding: 2px;">Old Provider to New Provider</span> <span style="border: 1px solid black; padding: 2px;">Provider to New Program</span> <span style="border: 1px solid black; padding: 2px;">Terminate Provider</span> </div> <p>PSA 04 - JAYHAWK AAA</p> <p><b>Change all POC Service Line Items from Old Rate to a New Rate for Nutrition Providers</b></p> <hr/> <p><b>Nutrition Provider</b> TOPEKA MOW NUTRITION PROVIDER <input type="text"/></p> <p><b>Funding Source</b> OAA3C2 <input type="text"/></p> <p><b>Service Code</b> HMEL - HOME DELIVERED MEALS <input type="text"/></p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p><b>Old Unit Rate</b></p> <p><input type="radio"/> 4.5</p> <p><input type="radio"/> 4.7</p> <p><input type="radio"/> 4.95</p> <p><input type="radio"/> 5.09</p> <p><input type="radio"/> 5.18</p> <p><input type="radio"/> 5.27</p> <p><input type="radio"/> 5.31</p> <p><input type="radio"/> 5.42</p> <p><input checked="" type="radio"/> 5.66</p> <p><input type="radio"/> 5.72</p> </div> <div style="width: 45%;"> <p><b>New Unit Rate</b></p> <p><input type="radio"/> 4.5</p> <p><input type="radio"/> 4.7</p> <p><input type="radio"/> 4.95</p> <p><input type="radio"/> 5.09</p> <p><input type="radio"/> 5.18</p> <p><input type="radio"/> 5.27</p> <p><input type="radio"/> 5.31</p> <p><input type="radio"/> 5.42</p> <p><input type="radio"/> 5.66</p> <p><input checked="" type="radio"/> 5.72</p> </div> </div> <p><b>* Effective Date</b> 07/01/2015 <input type="text"/></p> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <span style="border: 1px solid black; padding: 2px 10px;">PROCESS</span> <span style="border: 1px solid black; border-radius: 10px; padding: 2px 10px;">Cancel</span> </div> </div>	
8.	Click on the <b>Process</b> button.	A confirmation message appears: <div data-bbox="1036 1094 1442 1325" style="border: 1px solid gray; padding: 5px; margin: 10px auto; width: fit-content;"> <p style="text-align: right; margin: 0;">Message from webpage <span style="float: right; border: 1px solid red; padding: 0 2px;">X</span></p> <div style="text-align: center; padding: 10px;"> <p>Are you sure you want to process?</p> </div> <div style="display: flex; justify-content: center; gap: 20px; margin-top: 5px;"> <span style="border: 1px solid gray; padding: 2px 10px;">OK</span> <span style="border: 1px solid gray; padding: 2px 10px;">Cancel</span> </div> </div>
9.	Click on the <b>OK</b> button to confirm the Mass Update should run.	When the update has processed, a message displays, stating the number of records that were processed and if there were any errors.

# Old Provider to a New Provider

## How to

Follow the steps in the table below to process a change in the Provider.  
 Note: All fields in this Mass Update process are required.

Step	Action	Result
1.	Select the navigational tab <b>Old Provider to New Provider</b> .	Old Provider fields display, and a blank <b>...to a New Provider</b> region displays.
		
2.	Select the <b>Old Provider</b> from the drop-down list.	The Funding Source field displays.
3.	Select the <b>Funding Source</b> for the old provider.	The Service Code field displays.
4.	Select the <b>Service Code</b> for the old provider.	The Old Unit Rate choices display.
5.	Select the <b>Old Unit Rate</b> for the old provider.	The New Provider field displays in the '...to a New Provider' region.
6.	Select the <b>New Provider</b> from the drop down listing.	The New Funding Source and New Service Code fields display and are auto-populated with the same funding and service used by the old provider. These cannot be changed. The New Unit Rate and Effective Date fields and the Process button also display.
7.	Select the <b>New Unit Rate</b> to be used by the new provider.	
8.	Enter the <b>Effective Date</b> of the provider change.	This will be the Start Date of the new service lines created in affected plans of care.
		

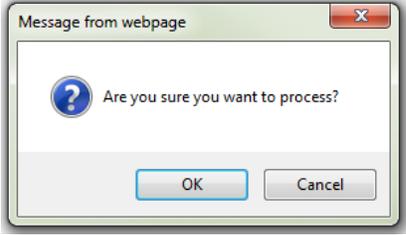
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## Old Provider to a New Provider, continued

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### How to

(continued)

Step	Action	Result
9.	Click on the <b>Process</b> button.	A confirmation message appears: 
10.	Click on the <b>OK</b> button to confirm the Mass Update should run.	When the update has processed, a message displays stating the number of records that were processed and if there were any errors.

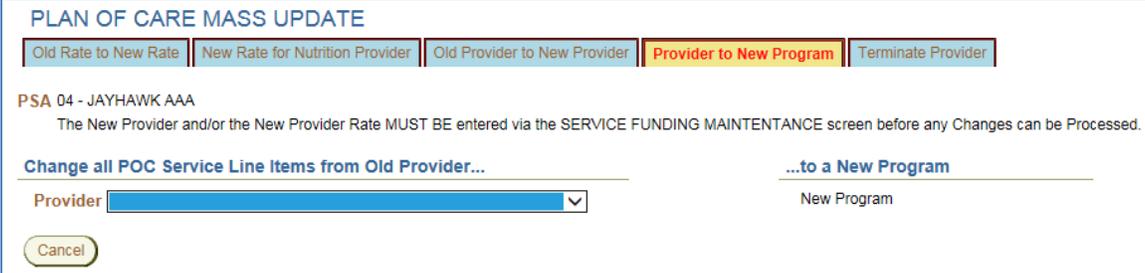
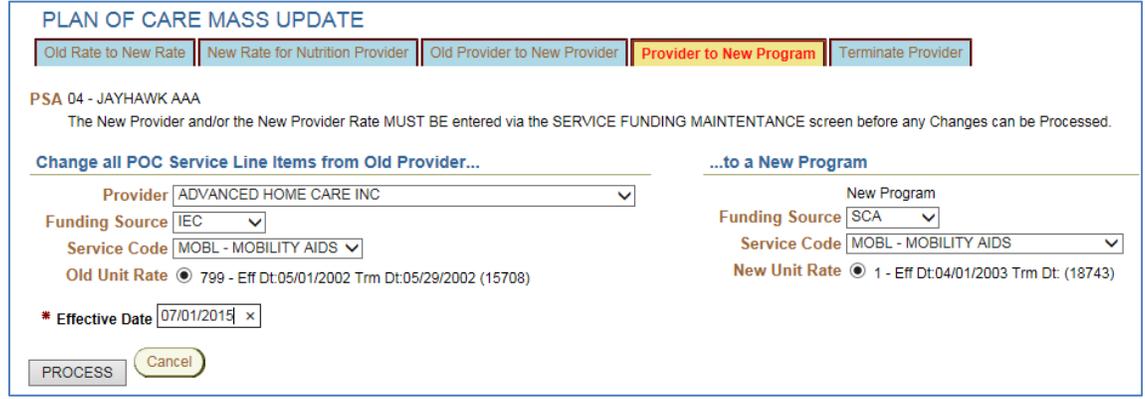
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# Same Provider to a New Program

## How to

Follow the steps in the table below to process a change in the funding source for an existing provider.

Note: All fields in this Mass Update process are required.

Step	Action	Result
1.	Select the navigational tab <b>Provider to New Program</b>	The Old Provider field displays, and a blank ' <b>...to a New Program</b> ' region displays.
		
2.	Select the <b>Provider</b> from the drop-down list.	The old Funding Source field displays. The new Funding Source field displays in the ' <b>...to a New Program</b> ' region.
3.	Select the old <b>Funding Source</b> for the provider.	The old Service Code field displays.
4.	Select the old <b>Service Code</b> for the provider.	The Old Unit Rate choices display.
5.	Select the <b>Old Unit Rate</b> for the provider.	
6.	From the <b>...to a New Program</b> region, select the new <b>Funding Source</b> for the provider.	The new Service Code field displays.
7.	Select the new <b>Service Code</b> to be used by the provider.	The New Unit Rate choices display.
8.	Select the <b>New Unit Rate</b> to be used by the provider.	The Effective Date field displays.
9.	Enter the <b>Effective Date</b> the new program (service/funding combo) should start.	This will be the Start Date of the new service lines created in affected plans of care.
		

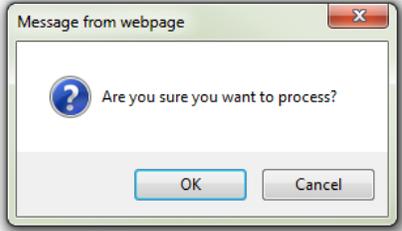
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## Same Provider to a New Program, continued

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### How to

(continued)

Step	Action	Result
10.	Click on the <b>Process</b> button.	A confirmation message appears: 
11.	Click on the <b>OK</b> button to confirm the Mass Update should run.	When the update has processed, a message displays, stating the number of records that were processed and if there were any errors.

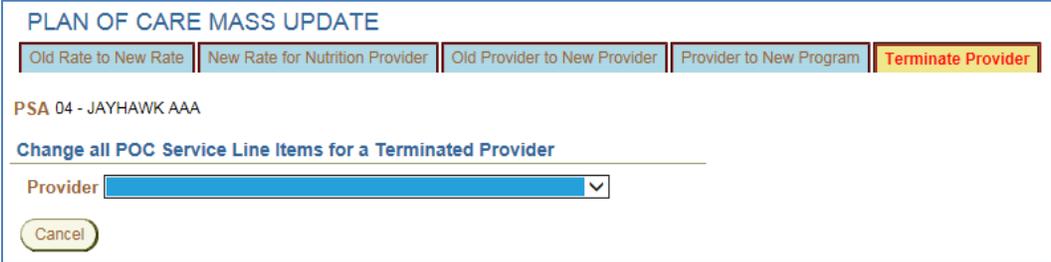
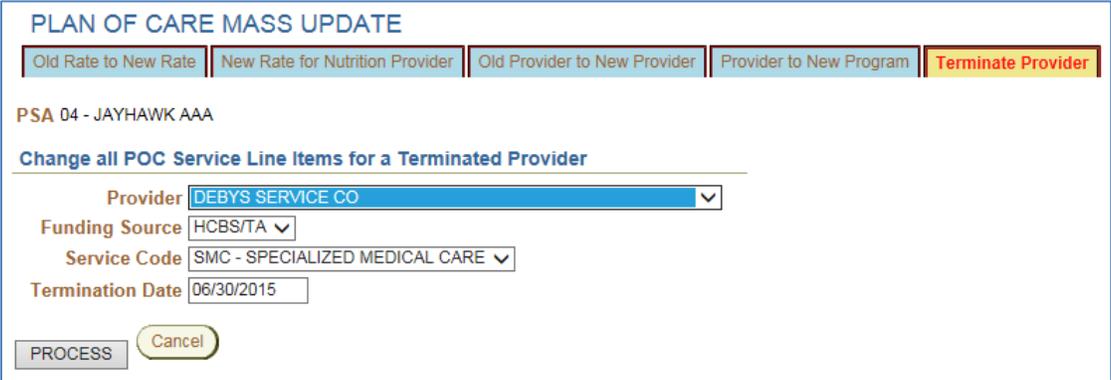
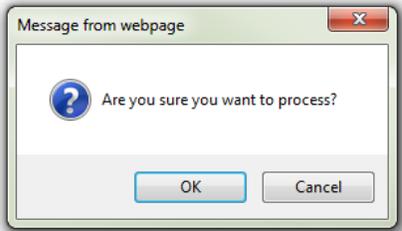
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# Terminate a Provider

## How to

Follow the steps in the table below to process a change when a Provider has terminated providing a specific service, or all services. Repeat these steps for all services the Provider is no longer providing.

Note: All fields in this Mass Update process are required.

Step	Action	Result
1.	Select the navigational tab <b>Terminate Provider</b>	The Provider field displays.
		
2.	Select the <b>Provider</b> from the drop-down list.	The Funding Source field displays.
3.	Select the <b>Funding Source</b>	The Service Code field displays.
4.	Select the <b>Service Code</b> to be terminated	The Termination Date field displays.
5.	Enter the <b>Termination Date</b> of the service	This is the End Date that will appear for this service on affected plans of care.
		
12.	Click on the <b>Process</b> button.	A confirmation message appears:
		
13.	Click on the <b>OK</b> button to confirm the Mass Update should run.	When the update has processed, a message displays stating the number of records that were processed and if there were any errors.